AR Portal User Guide

Notifying a Claim

Introduction

The purpose of this document is to outline the processes and guidance for the Appointed Representative Portal
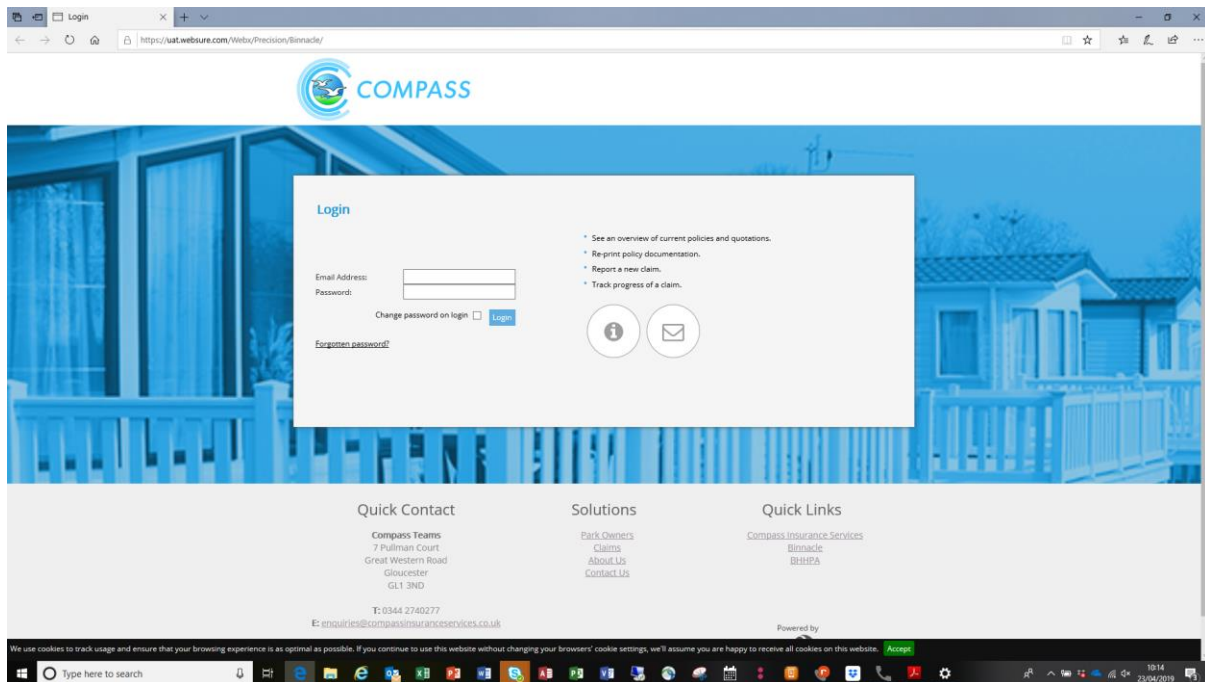
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Logging In

The following link enables you to access the login screen

https://portal.compassinsuranceservices.co.uk/Extranet/
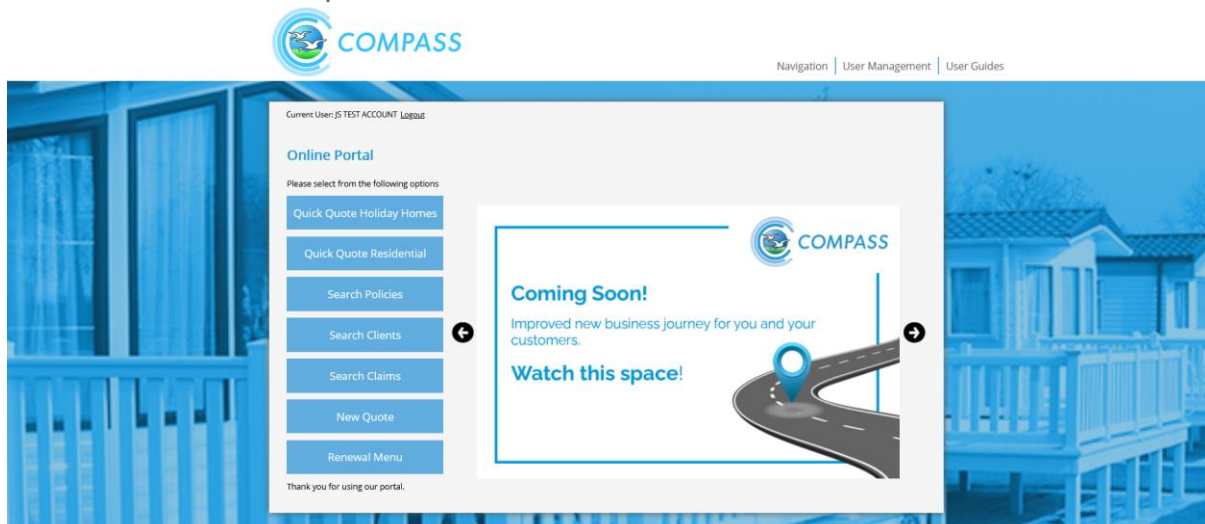
This will bring up the following screen

You will be issued with

- Username
- Password

Enter these into the fields shown and click **Logon**

Basic Navigation

The home screen of the portal is as follows

From this screen there are quick links to

- Quick Quote Holiday
- Quick Quote Residential
- Search Policies
- Search Clients
- Search Claims
- New Quote
- Renewal Menu

At the bottom of the screen there are also links to Compass information and websites for the user to follow.

The Navigation drop down also allows the user to access various parts of the Portal from any screen in the portal.

The portal does not allow use of the **Back** button on the users browser and navigation through the screens should only be done using the navigation built into the portal itself

Oops!

Please do not use browser navigation buttons. Please use the navigation buttons that this application provides.

Okay

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User and Data Hierarchy

The portal stores the following accounts

Account	Description	Relationships
Policy	The policy and all corresponding risk data	A policy can only have one Client, one Park and one AR
Client	The client and all corresponding data	A client can have multiple policies across multiple Parks and under multiple Ars
AR	The account under which the parks, clients and policies are held	An AR can have multiple Parks on which there are multiple clients with policies. Each AR can also have multiple users
Park	The account that drives the rating, commission and terms applied to policies	A Park can only be linked to one AR but can have multiple Clients and Policies on it
User	The account that drives the transactions on the portal	A User can only access the AR they are linked to and can access multiple Parks, Policies and Clients. Access can be restricted to a single Park within the AR

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Submitting a Claim

You can submit a claim from the Policy Menu, go to the 'Search Policy' option from the dropdown menu

Then use the criteria to find the policy you need, and press 'Select'

The following screen will appear

Select the 'Claims' option to bring up the following screen

Select the 'Add a new claim' option

You will need to complete the following fields

Field Title	
Date of Loss	The date the incident occurred. If this is not known exactly i.e ingress of water discovered at a later date then select today's date
Reported Date	This will default to today's date
Loss Code	This is the type of loss suffered, the most common types are (this can be changed after you have notified us if the cause turns out to be something different) Accidental Damage – damage that is accidental Damage to Caravan – damage to the structure Damage to Contents – damage to the contents Escape of Water – water escape internally Flood damage – damage due to flooding Storm damage – damage due to storm
Details	Give a good description from the client of what happened, when it happened, and any parties involved
Please provide estimated loss amount:	An estimate of the cost of the loss

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You can also upload any documents such as a claim form, photographs etc by using the document upload option
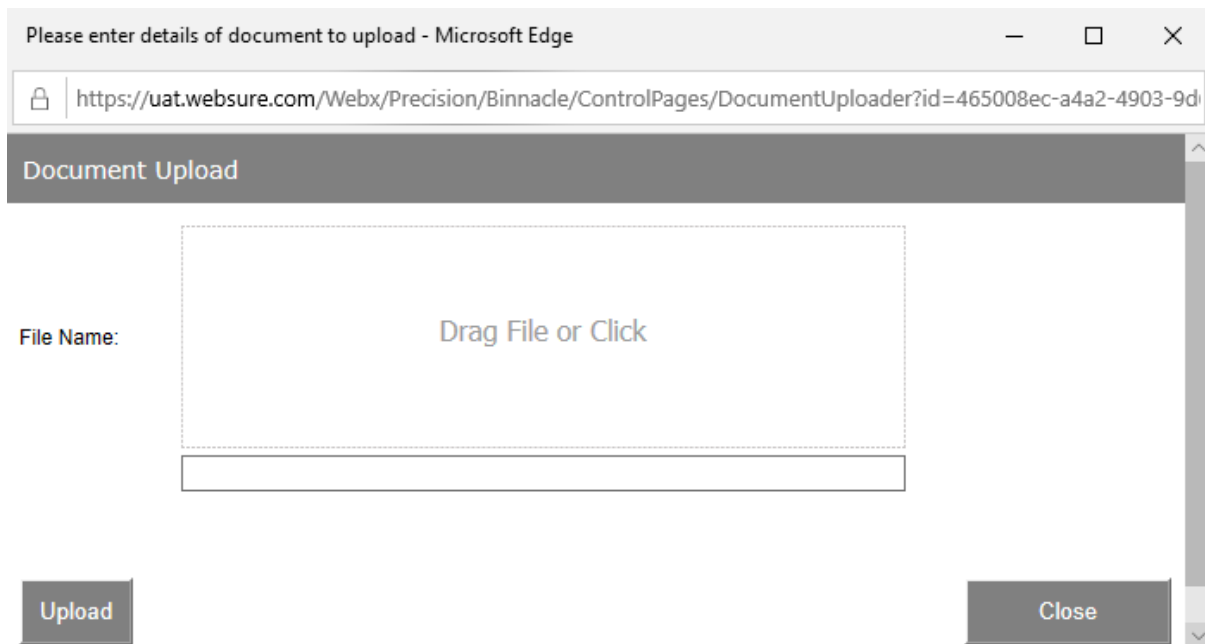
Once all the information is entered then click 'Submit this Claim'

The claim now shows on the policy